

Nonprofit Technology Network

Your Voices:

2007 NTEN Community Survey Report

**An NTEN Report
August 30, 2007**

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About NTEN: The Nonprofit Technology Network

What we believe

NTEN aspires to a world where all nonprofit organizations skillfully and confidently use technology to fulfill their missions. As the membership organization for the nonprofit technology community, NTEN plays a unique role in this field. Our work is to connect our members and provide you with learning and professional development. We give a bird's-eye view of the trends, issues, and opportunities that influence nonprofits' use of technology. Our ability to see the big picture and context allows us to identify common areas of opportunity and organize for action.

What we do

NTEN is a community of peers who share technology solutions across the sector and support each other's work. We enable our members to embrace advances in technology confidently through on- and off-line knowledge sharing, hands-on trainings, and research and industry analysis. Our discounts help our members stay up-to-date with changing technology and valuable resources. We offer news and pioneering industry research and are a channel for the dissemination of innovation and learning in this field.

NTEN WEBINARS / nten.org/webinars

NTEN hosts many online trainings and discussions each month on topics related to nonprofit technology.

ONLINE NETWORKING / groups.nten.org

Do you want to connect with other nonprofit webmasters, talk about open source CMS tools with others passionate about them, or learn ways to use Flickr in your next campaign? Then join one of these NTEN Affinity Groups (or a few of the more than 90 others) and start talking.

NTEN EVENTS / nten.org/events

Attend our conferences and local meet-ups where people like you come together to share experiences, learn, network, make deals, and have some fun.

NTEN Research / nten.org/research

Our industry-leading research is growing and expanding. We have recently published studies on IT Salaries and Investments in the nonprofit sector, the impact of technology consulting, and the challenges of data integration and Open APIs. We cover policy issues such as Net Neutrality, the use of mobile phones or content management systems in nonprofits. Look for more in 2007 here.

NEWSLETTERS / nten.org/signup

NTEN Connect is your opportunity to read about the latest issues from a variety of viewpoints. For each issue we ask leaders in the nonprofit technology community to sound off on a topic that's impacting the field.

NTEN BLOG / nten.org/blog

NTEN's blog is the place to find out about the latest resources, nonprofit tech news, and buzz from the NTEN community.

About the Survey

We conduct an annual Community Survey to find out more about who is in the NTEN community, and to get feedback about how we best serve this nonprofit technology community's needs.

The NTEN Community is made up of supporting members and participants in NTEN programs, events, or email lists, totaling just under 10,000 nonprofit and technology professionals. The survey was conducted in July 2007.

We received responses from 808 individuals. A little over half of respondents were NTEN members (55.8% answered that they were members, 33.0% said they were not members, and 11.2% did not know whether they were members).

This report presents (I.) demographic data with analysis and (II.) further analysis focused on the core constituency groups of the nonprofit technology community.

From the Community:

"I have thoroughly enjoyed being a part of this community and I hope that I can be able to get more and more information about the NPtech community, and better help my organization integrate technology to catalyze the spread of our mission!"

– Kara Carrel, Interfaith Youth Core

Key Findings

> **Communications and Marketing Represents Both the Fastest Growing Constituency and a Significant Organizational Challenge.**

Compared to our 2006 survey, the percentage of respondents who categorize themselves as Marketing or Communications staff has increased about 4.5% among NTEN members and the wider NTEN community, which represents the biggest change in makeup of our community in terms of job role. Also key this year is that survey respondents rated Communications and Marketing high as a significant organizational challenge (an average rating of 4.15 out of 5, which was the highest average rating of all challenges listed).

> **NTEN Members Reflect the General Nonprofit Technology Community but Not the General Nonprofit Sector.**

NTEN Members are representative of the Nonprofit Tech Community but not of the sector at large. In 2007 we saw a continuation of a trend we noticed in 2006: that the demographic makeup of those who are NTEN members closely resembles the demographic makeup of the wider nonprofit technology community. However, our community does not reflect that of the general nonprofit sector in the U.S., of which more than two-thirds report a budget size less than \$500k. The nonprofit technology community is more likely (59% of all respondents) to report a budget size greater than \$1M.

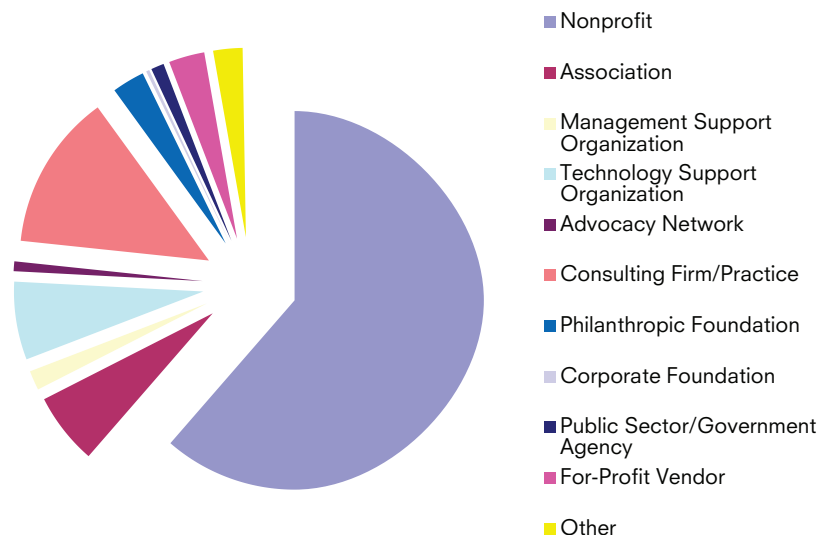
NTEN Community Demographics

NTEN membership is trending to more closely reflect the makeup of the general nonprofit technology community.

Which of the following most accurately describes your organization?

	% Members	% Non-members	% All Respondents
Nonprofit	61.4	67.5	64.19%
Association	6.3	7.8	6.04%
Management Support Organization	1.7	0.7	1.61%
Technology Support Organization	6.6	3.3	5.03%
Advocacy Network	0.7	2.6	1.41%
Philanthropic Foundation	2.8	0.7	2.01%
Corporate Foundation	0.3	0.0	.20%
Public Sector / Government Agency	1.0	0.7	1.01%
For-Profit Vendor	3.1	5.8	3.82%
Consulting Firm / Practice	13.5	5.8	10.87%
Other	2.8	5.2	3.82%

As expected, NTEN's biggest constituency, at both the member and wider community levels, are nonprofit organizations. The percentage of NTEN members who are nonprofits has steadily grown each year, with a sharp 8 point increase over the last year. The percentage of non-members who are from nonprofit organizations has remained somewhat steady (67.1% in 2006, and 68% in 2004, with no data for 2005), which suggests that NTEN membership is closely reflecting the makeup of the general nonprofit technology community.



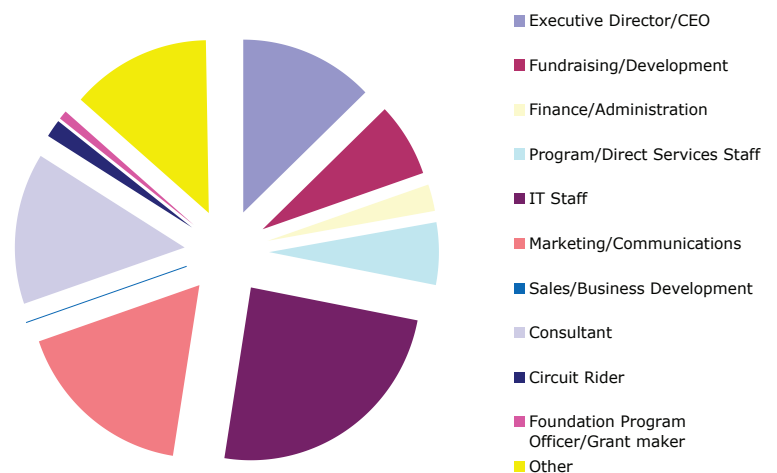
Marketing and Communications staff are the fastest growing constituency in the nonprofit technology community among NTEN members.

Which of the following most accurately describes your position?

	% Members	% Non-members	% All Respondents
Executive Director / CEO	12.8	14.9	13.31%
Fundraising / Development	6.9	4.6	6.25%
Finance / Administration	2.4	2.0	2.82%
Program / Direct Services Staff	5.9	11.0	7.86%
IT Staff	24.6	26.6	24.6%
Marketing / Communications	17.0	12.3	15.52%
Sales / Business Development	0.0	2.6	0.81%
Consultant	14.2	10.4	12.7%
Circuit Rider	1.7	0.7	1.21%
Foundation Program Officer	1.0	0.0	0.81%
Other	13.5	14.9	14.11%

NTEN's largest constituency in terms of job role continues to be those who label themselves as IT Staff. Marketing and communication staff are the fastest growing constituency in the nonprofit technology community and among NTEN members. Senior leadership -- those who identified themselves as EDs and CEOs - comprise a steady 13% of our membership.

Another change of note in our community is the increase of fundraising and development staff among NTEN members (up 3 percentage points from last year) – although there is a decrease in that same group among non-members (down 3.7 points from 8.3% in 2006). This may be a reflection of our increased program offerings to both communications and fundraising staff, who are more likely to be participating in the NTEN Community as members than as non-members.

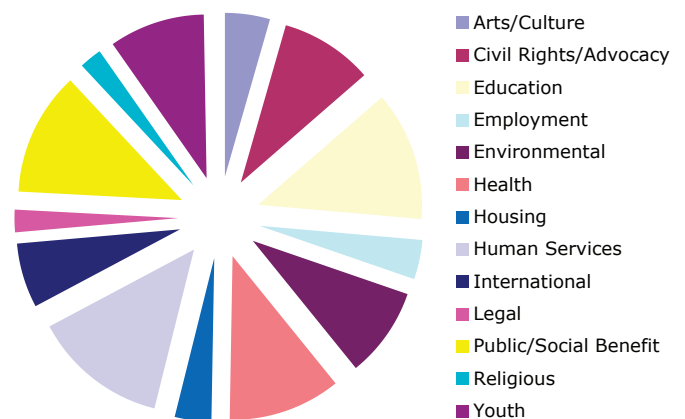


Education, Human Services, and Public / Social Benefit continue to be the primary focuses of the organizations in our community.

If your organization has a programmatic focus, which of the following represents your focus area?

	% Members	% Non-members	% All Respondents
Arts / Culture	10.6	10.9	11.22%
Civil Rights / Advocacy	21.2	19.4	19.2%
Education	29.7	39.5	33.67%
Employment	9.3	14.7	10.97%
Environmental	20.4	15.5	17.71%
Health	26.1	28.7	26.18%
Housing	8.0	13.2	9.73%
Human Services	31.4	28.7	29.68%
International	14.6	13.2	13.47%
Legal	5.3	7.8	6.73%
Public / Social Benefit	28.3	27.1	27.68%
Religious	5.3	4.7	4.99%
Youth	22.6	21.7	20.70%

Education, Human Services, and Public/Social Benefit continue to make up the majority of focus among our community. Where there are noticeable gaps between members and non-members, those who focus on Civil Rights/Advocacy, Environmental, and Human Services issues are more likely to be members than non-members while those who focus on Employment, Housing, and Legal issues are more likely to be non-members, possibly reflecting the presence of other membership associations in those communities.



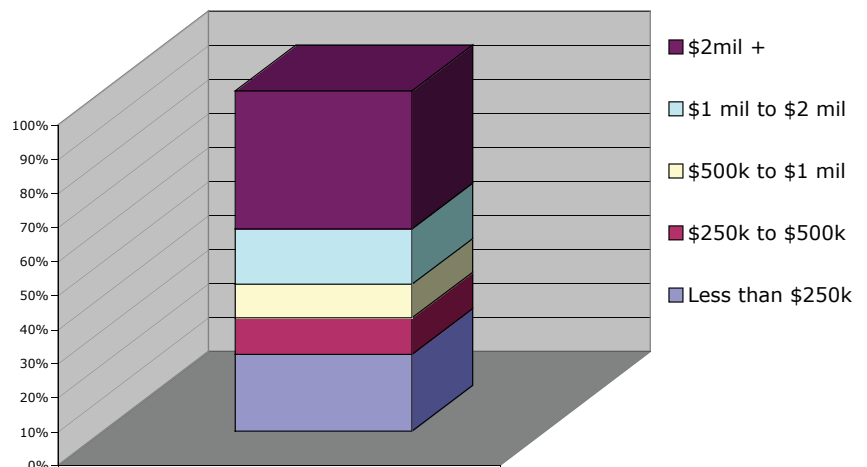
The budget spread among NTEN members continues to reflect the spread among the general nonprofit technology community

What is your organization's budget?

	% Members	% Non-members	% Nonprofits	% Tech Support Orgs	% Consulting Firm / Practice	% All Respondents
Less than \$250k	21.9	23.1	16.0	52.4	55.6	22.53%
\$250k to \$500k	8.8	11.9	9.6	4.8	15.6	10.73%
\$500k to \$1 mil	8.4	13.3	9.3	14.3	13.3	9.87%
\$1 mil to \$2 mil	15.0	16.1	16.0	19.1	4.4	16.31%
\$2 mil +	46.0	35.7	49.0	9.5	11.1	40.56%

The percentage of NTEN members with budgets exceeding \$2 million has continued to increase, up almost 5 points from last year and 12 points since 2004. The biggest change in this set is for Technology Support Organizations (TSOs), half of whom over half report a budget size of less than \$250K this year compared to 37% of TSO's in this budget size last year. The budget spread among NTEN membership continues to reflect the spread among the general nonprofit technology community, which is most likely to have a budget size greater than \$2million, with the next likely budget size being under \$250k.

This does not reflect the budget spread among the general nonprofit sector in the United States which, according to 2003 data from the National Council of Nonprofit of Associations, shows that 68% of nonprofit organizations report a budget size under 500k, and only 23% report budget sizes greater than 1M.

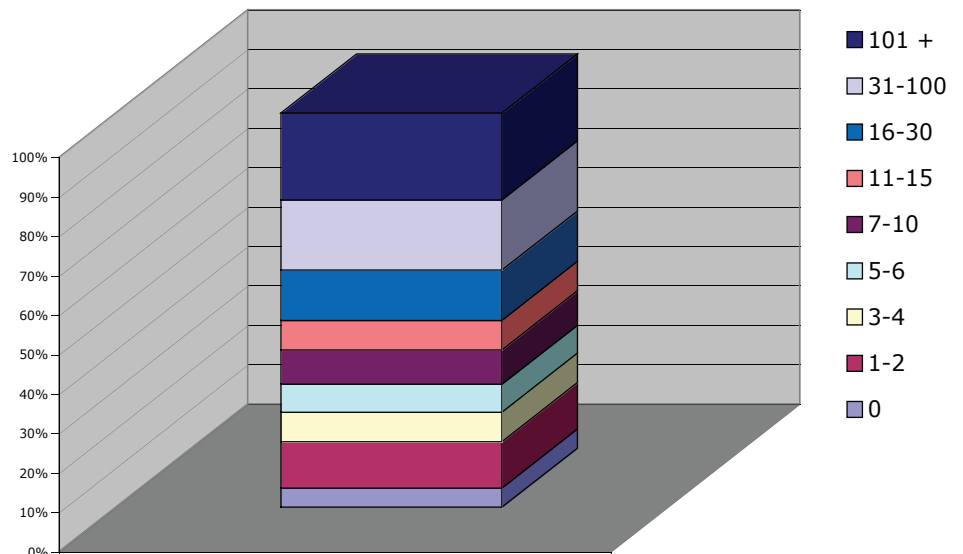


TSO's have undergone the most change in organizational staff size since we began surveying our community

How many full-time staff members are employed by your organization?

	% Members	% Non-members	% Nonprofits	% Tech Support Orgs	% Consulting Firm / Practice	% All Respondents
0	4.2	5.3	3.8	12.5	9.4	4.90%
1-2	10.9	13.2	5.6	29.2	47.2	11.84%
3-4	6.7	7.9	8.8	4.2	5.7	7.55%
5-6	7.4	6.6	6.9	8.3	5.7	7.14%
7-10	9.5	6.6	7.5	4.2	13.2	8.78%
11-15	8.4	6.6	6.9	8.3	1.9	7.55%
16-30	13.0	12.5	12.2	16.7	5.7	12.86%
31-100	16.1	21.1	21.9	16.7	7.6	17.96%
101+	24.6	21.7	26.7	0	3.8	22.24%

In general, the percentage of our community from organizations with staff of more than 100 has increased: up 2.5% among NTEN members, 1% among non-members, and just less than 1% among all respondents since 2006. This is not the case among TSO's or Consulting Firms, however, which have consistently reported smaller staffs compared to the whole community since we began surveying in 2004, and have been decreasing in staff size. TSO's have undergone the most change since we began collecting data: in 2004 they reported staff sizes equivalent to nonprofits that year, while the recent survey shows more similarities between TSO's and Consulting Firms.



Our respondents were most likely to cite Communications and Marketing as their biggest challenge

Which of the following areas represents significant challenges for your organization (on a scale of 1 to 5)?

	Members	Non-members	Nonprofits	Tech Support Orgs	Consulting Firm / Practie	All Respondents
Raising foundation grants for technology	3.50	3.44	3.81	3.00	2.52	3.54
Fundraising from individual donors	3.62	3.85	4.14	2.94	2.29	3.77
Generating earned income	3.37	3.54	3.29	4.00	4.07	3.43
Communications and marketing	4.18	4.08	4.23	3.88	4.09	4.15
Sharing data within my org	3.95	3.95	4.15	3.00	3.08	3.94
Building/Maintaining Tech Infrastructure	3.95	3.85	4.04	3.76	3.30	3.93
Training myself	4.03	3.88	4.01	3.68	4.04	4.00
Training staff	3.89	3.79	3.99	2.83	3.32	3.86
Finding relevant tech information	3.98	3.94	3.99	3.65	4.07	3.97
Making strategic IT leadership decisions	3.88	3.79	3.87	3.50	3.56	3.83
Connecting with Peers	3.77	3.57	3.64	3.94	4.02	3.7
Evaluating / Purchasing Tech	3.68	3.51	3.68	3.59	3.40	3.63
Buy in from leadership and/or staff	3.55	3.50	3.73	2.65	2.63	3.55
Learning about policy issues	3.10	2.99	3.16	3.39	3.43	3.32
Working with Tech Consultants	3.28	3.17	3.16	3.39	3.43	3.23
Understanding the tech policy issues that affect my work	3.35	3.26	3.42	3.21	2.80	3.33
Sharing data between organizations	3.17	3.25	3.23	2.82	3.17	3.2

Our survey respondents were most likely to cite “Communications and Marketing” as their biggest challenge, followed by “Training Myself,” and “Finding Relevant Technology Information,” respectively. These three concerns were also the highest-ranked challenges in 2006.

A notable change from the 2006 survey is that nonprofits, as a group, also rank “Communications and Marketing” highest as an organizational challenge this year whereas 2006 data showed the group slightly more likely to rate “Fundraising from Individual Donors” as the most significant organizational challenge.

In considering organizational types, TSO’s and Consulting Firms are more likely to rate “Connecting with Peers” as a significant challenge while Nonprofits are more likely to cite “Sharing Data within My Organization” as a significant challenge. NTEN members are more concerned with training themselves and their staff than non-members. “Learning about Policy Issues” is the least cited challenge for the nonprofit technology community.

From the Community:

“I appreciate NTEN’s enthusiastic support and understanding of nonprofit functioning through its breadth of services and information available to members.”

-- Elaine Glowacki, Wisconsin Women’s Network

Further Analysis of the Core Constituencies

According to our survey, the NTEN community has four major constituencies: IT Staff, Communications and Marketing Professionals, ED/CEO's, and Consultants.

IT Staff

Of those who categorized themselves as IT Staff, 58% also reported that they were members of NTEN. The most cited reason among this group for becoming a member is for Professional Development and Networking, followed by the Nonprofit Technology Conference, which are also the most cited reasons for becoming a member of NTEN among the other constituencies. This group reports having heard about NTEN from colleagues (29.4%) or an email list (29.4%).

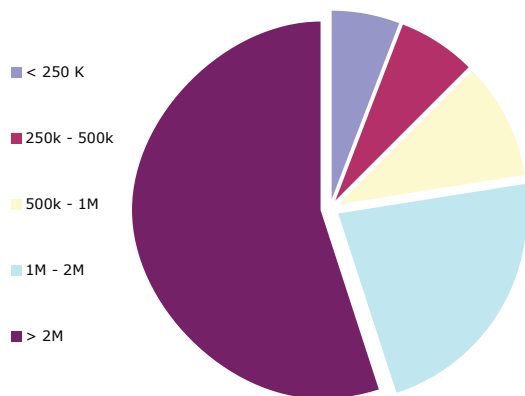
IT Staff in this community are primarily part of nonprofit organizations (82%), and are more likely to be associated with Health (35%) or Human Services (35%) organizations. Just over half (54.6%) report an organizational budget greater than \$2 million. This group rates "Sharing Data with My Organization" as their biggest challenge (average score of 4.23 out of possible 5 in significance of challenge), followed by the challenge of "Building/Maintaining Technology Infrastructure" (4.14).

The most cited web sites among this group are: www.nten.org, www.techsoup.org, and Beth Kanter's blog (<http://beth.typepad.com/>) gets an honorable mention.

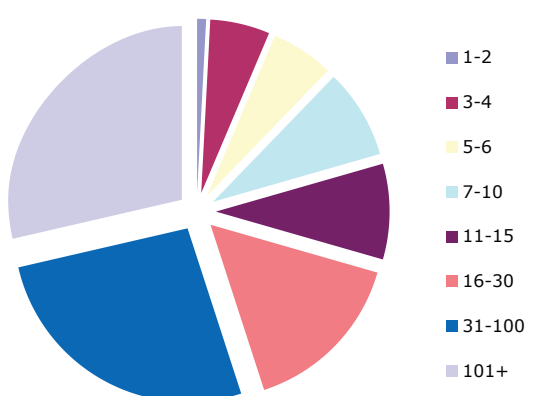
IT Staff Challenges:

"Sharing data with my Organization" is the most cited organizational challenge for IT staff.

IT Staff by Org Budget Size:



IT Staff by Org Staff Size:



Communications and Marketing Staff are the second-largest and fastest-growing constituency of the nonprofit technology community

Communications and Marketing Staff

Our second largest--and fastest growing--group are also likely to be NTEN members (63.6% said they were members). This group heard about NTEN from colleagues (35.7%) or email lists (32.1%).

Communications and Marketing staff in the nonprofit technology community also primarily work at nonprofit organizations (71.4%), and tend to focus on Environmental (26.7%), Human Services (25.0%), or Public/Social Benefit (23.3%) issues for their work. This group is more likely to belong to an organization with a staff size of 31-100 (31.2%) or over 100 (26%). Not surprisingly, this group rated "Communications and Marketing" highest among organizational challenges (4.41), followed by "Sharing Data with My Organization" (4.26).

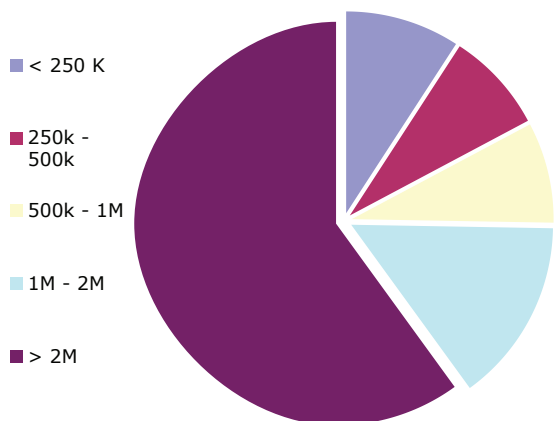
Marketing Staff Facts:

> 63.6% of this group are members of NTEN

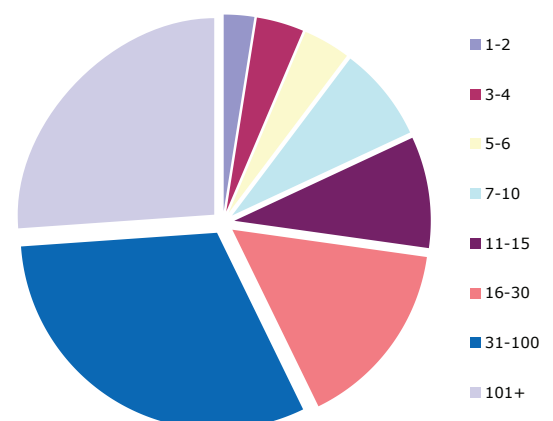
> 60% of this group report a budget size over \$2 million

This group is likely to frequently visit www.nten.org and www.techsoup.org, but also visit www.boingboing.net, and www.netsquared.org.

Communications Staff by Org Budget Size:



Communications Staff by Org Staff Size:



ED's / CEO's

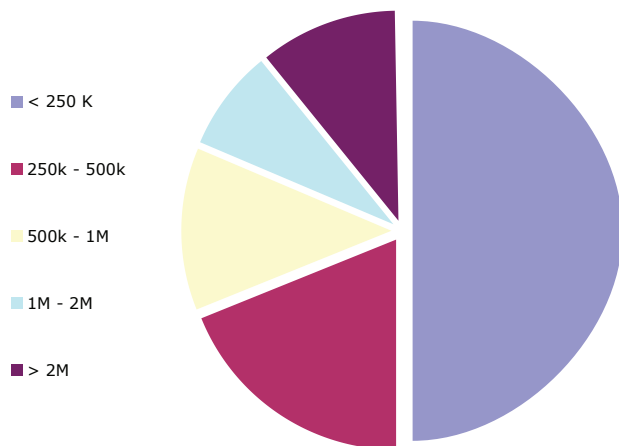
Over half of those who categorized themselves as ED/CEO also said they were members of NTEN (56%). In addition to Professional Development and Networking (73%) and the Nonprofit Technology Conference (46%), this group also reports that the 501 Tech Clubs are a main reason for joining NTEN (35.1%). Unlike the other constituencies, this group learns about NTEN primarily from email lists (41.4%) and from nonprofit or technology conferences or events (34.5%). Over half (62%) work at nonprofit organizations, while 15.2% are from consulting firms or practices. Interestingly, over half (54.7%) report that their work or organizational focus is Education. Half of those in this group list their organizational budget as under \$250k (50.8%). This group tends to come from smaller organizations with 29.2% reporting 1-2 full-time staff and 18.5% reporting 3-4 full-time staff.

ED & CEO Facts:

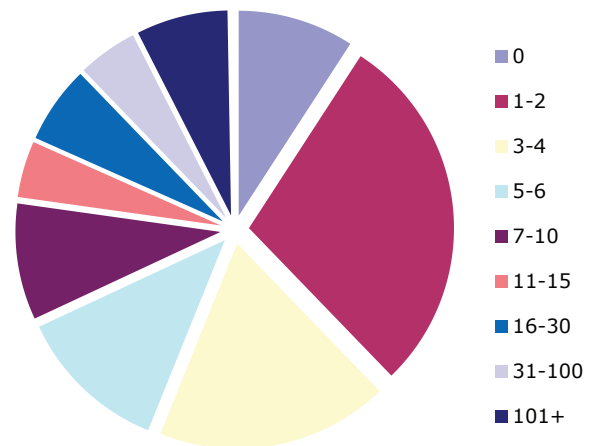
- > 50% report a budget size less than \$250k
- > Over 1/3 of this group learn about NTEN from technology conferences or events

The biggest challenge affecting the organizations of those in this category is likely to be "Communications and Marketing" (rated 4.13 out of possible 5) followed by "Training Myself" (3.87) and "Fundraising from Individual Donors" (3.87).

EDs/CEOs by Org Budget Size:



EDs/CEOs by Org Staff Size:



Two-thirds of the consultants in the nonprofit technology community are also members of NTEN

Consultants

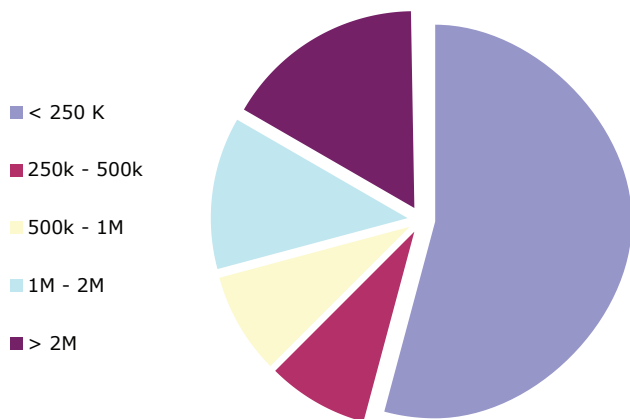
Of the four main groups in the NTEN community, Consultants are most likely to also be NTEN members (66%). This group is also most likely to have heard about NTEN by word-of-mouth (36.4%) or an email list (31.8%). In addition to Consulting Firms/Practices (57%), those who fit into this category also report working for Technology Support Organizations (12.7%). Half report their issue focus area to be Education, and just over half (54.2%) come from organizations with budget sizes less than \$250k. This group also tends to be part of a small staff, with 40% reporting a full-time staff of 1-2. The two most-cited organizational challenges for this group are “Communications and Marketing” (4.04) and “Generating Earned Income” (3.96).

Consultant Facts:

- > **Consultants in the Nonprofit Technology Community are most likely to be NTEN members**
- > **Over half report revenue size less than \$250k**

This group frequents www.idealware.org, www.techsoup.org, Beth Kanter’s blog (<http://beth.typepad.com/>), and Deborah Elizabeth Finn’s blog (<http://blog.deborah.elizabeth.finn.com/blog/>).

Consultants by Org Budget Size:



Consultants by Org Staff Size:

